



Evaluation Support Contract Checklist

This checklist has been designed to help identify key issues in developing a small acquisition contract or work assignment under a contract for conducting an evaluation. It is intended as a tool to help avoid potential mis-understandings throughout the course of having an outside source conduct a project or program evaluation. Advance agreement of these issues can mean the difference between a successful evaluation and an unsuccessful one.

Check each item as: important and incorporated √ , not applicable na ; or leave blank if not agreed to.

Administrative Items

General Considerations

- ☐ What is being evaluated
- ☐ Why is it being evaluated
- ☐ For what purpose will evaluation be used
- ☐ What type of evaluation will be used (e.g., outcome, process)
- ☐ Who is the customer
- ☐ Who is the audience
- ☐ Measuring evaluation success
- ☐ Contract vehicle is in place

Budget

- ☐ Type of budget vehicle
- ☐ Payment amounts and dates
- ☐ Schedule for invoice reports and updates on budget spent to date
- ☐ Conditions for payment (e.g. delivery of report)
- ☐ Restrictions/ limits

Oversight and Management

- ☐ Contact person(s)
 - ☐ Communications channels/ rules
- ☐ Timeline for work
- ☐ Assignment of responsibilities
 - ☐ Contractor
 - ☐ Client

Evaluation Design and Methods

Evaluation Design/ Process Modifications

- ☐ Provisions to review or modify evaluation design
- ☐ Provisions to review or modify evaluation scope

- ☐ Work assignment amendments
 - ☐ timeline
 - ☐ scope

Data Collection/ Analysis

- ☐ What data is required
- ☐ How will data be collected
 - ☐ collection instruments
 - ☐ collection protocols
 - ☐ Paperwork Reduction Act
- ☐ What information sources
- ☐ Assuring adequate information
- ☐ Is permission needed to collect data
- ☐ Is data verifiable
- ☐ Level of data quality required
- ☐ Provisions to assure data quality
- ☐ Procedures to analyze quantitative data
- ☐ Procedures to analyze qualitative data

Reports

- ☐ Deliverables and due dates
- ☐ Interim reports
 - ☐ format
 - ☐ content
 - ☐ length
 - ☐ audience
- ☐ Final reports
 - ☐ format
 - ☐ content
 - ☐ length
 - ☐ audience
- ☐ Review of interim and final reports
 - ☐ process
 - ☐ responsibilities
 - ☐ timeline
- ☐ Printing arrangements
- ☐ Reporting restrictions/ permissions
- ☐ Editorial authority
- ☐ Confidentiality
- ☐ Distribution